TEAM TRAINING STRATEGY

Department of Transportation DELPHI Program

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Contents

Education Planning Worksheet

Description

The following worksheet contains education courses (outside of the Oracle Financial Application training classes) that are required for the DELPHI Program Team members to fulfill their assigned roles on the program.

Course Name	Description	Content	Source	Location	Participants
AIM™	AIM Overview	Overview of AIM Phases, Activities, Tasks, Deliverables	Oracle	DOT - MMAC Oklahoma City, OK	All DELPHI Program Team members
Catalyst™	Catalyst SDL Overview	Overview of Catalyst SDL Methods, Tasks, Deliverables	CSC	DOT - MMAC Oklahoma City, OK	DELPHI program group leaders and group members
Microsoft Office™	Microsoft Office software	Hands on instruction on MS Word, MS Excel, MS PowerPoint, MS Access			DELPHI Program Team members as needed
ABT Project Workbench™	ABT Project Workbench software	Hands on instruction on ABT Project Workbench			DELPHI Program Management Team as needed, and DELPHI Program Support Resource
Documentation Studio™	Produce On-line Help Files	Hands on instruction in Doc-to-Help	Wextech	DOT – MMAC Oklahoma City, OK	DFS responsible for user documentation, DELPHI Program Support Resource, Program Management Team, Configuration Coordinator, Communication and Training Lead
Program Plan	Overview of DELPHI Program Plan	Overview of DELPHI Tasks and Deliverables	CSC/Oracle/ MMAC	DOT – MMAC Oklahoma City, OK	DELPHI Program Team members
OA Responsibilities	OA Responsibilities Overview	Overview of OA Deliverables and Involvement in the Plan as well as an overview of OA tasks to prepare for implementation.	CSC/Oracle/ MMAC	DOT – MMAC Oklahoma City, OK	DELPHI Program Team members, OA Users

Applications Training Planning Worksheet

This section contains information on the Oracle Financial Application training classes that are required for the DELPHI Program Team members to fulfill their assigned roles on the program.

Training Coordination

This worksheet contains the training coordinators for each site where Oracle Financial Applications training will be conducted for the Program Team members. If changes or cancellations occur, the coordinator for each site will communicate the changes to the attendees.

Site Name	Training Coordinator	Title	E-mail Address	Phone
MMAC	tbd	DELPHI Communications and Training Leader		
MMAC	tbd	Oracle Training Coordinator for DELPHI program		
FTA	tbd			
USCG	tbd			
FAA	tbd			
FHWA	tbd			
FRA	tbd			
NHTSA	tbd			
MARAD	tbd			
VOLPE	tbd			

Recommended Training

The following describes the training classes that are recommended for the DELPHI Program Team members to gain the knowledge necessary to fulfill their assigned program roles.

1. The Introductory Training class (drafted below) provides program team members with an understanding of navigation in and out of the Oracle applications, the Oracle accounting flexfield structure, basic functions within the applications and a basic technical foundation. The Introductory Training class has two parts: Functional and Technical. The Functional portion is during the first 13 days of class. The Technical portion is during the last 2 days. Introductory training is given for program team members before the first solution demonstration lab (SDL) in Oklahoma City at the Mike Monroney Aeronautical Center (MMAC). It is given again at a location in the Washington DC area for operating administration super users and program team members who begin working on the program after the first introductory training session. This training will be given before the second SDL (see program workplan). The content of the introductory training is tailored for DOT. Therefore it is imperative that all participants be present for their designated sessions.

2. The Advanced Training provides functional program team members with an understanding of more complex functions in the applications as well as setup training. Advanced training is given at MMAC for program team members who completed SDL-1. This training will be given before the second SDL (see DELPHI Workplan).

3. The Technical Training class provides the appropriate program team members with the skills to administer and performance tune the database and Web server, perform application system administration functions, build and tune queries using SQL and other Oracle query tools and use Oracle Alerts. Before determining the training necessary to complete tasks on the program, the prospective participants will be given an assessment to pinpoint the knowledge they require. Unless the number of participants warrants bringing an instructor in to MMAC to give the training, participants will be sent to an Oracle training site.

The training components were drawn from the listing on Oracle Education's web site. Please note that we may choose not to cover some components in formal training classes; instead the consultants for the group will explain these concepts as we work in SDL.

Introductory Training

(updated based on discussions with Oracle instructor Mary Clancey - 4/28/98)

Timing	Training Component	Attendees

Week 1
Day 1
(1/2 day)
	I. System Basics
	
	A. Log On
	    1. Responsibility vs. User ID
	B. Navigation and Terms Definitions
	    1. Navigate in and out of applications
	    2. Form, zone, field, list of values, query, alternate region
	    3. Concurrent Manager
	    4. Flexfield (Descriptive vs. Key)
		All program team members will attend System Basics, Understand Functions of Oracle Financial Applications, and General Ledger. At least one application course is prerequisite to the technical foundation course.
		AA (DOT), BPGL, CVL, DBA, DFS, DSA, PJL, PM, CC, TAR, PS, TPL, TRL

Week 1 Day 1 (1/2 day)	**II. Understand Functions of Oracle Financial Applications (Part 1)** A. Review the business and information flows of Oracle Financial Applications; discuss integration and the concurrent processes used to manage the transfer of data among applications	

Week 1
Day 2, 3, 4
(2 ½ days)
	III. General Ledger
	
	A. Define a Set of Books
	    1. Define Accounting Flexfield
	        a) Define Value Set
	        b) Define Segments
	        c) Define Segment Values (for SOB required accounts)
	    2. Define Calendar
	    3. Define Currency
	    4. Define Set of Books
	B. Build the Chart of Accounts
	    1. Discuss Dynamic Insertion
	    2. Discuss Security Rules
	    3. Discuss Cross Validation Rules
	    4. Define Code Combinations
	    5. Discuss Summary Accounts
	    6. Discuss Parent/Child Definitions
	    7. Discuss USSGL Transaction Codes
	C. Multi-Org Overview (complete discussion here; it may begin above during Introduction to Oracle Financials)
	    1. Set of Books
	    2. Inventory Organization
	    3. Legal Entity
	    4. Operating Unit
	D. Create Standard, Recurring and Reversing Journal Entries
	    1. Enter journals	

Timing	Training Component		Attendees
		2. Define recurring journals	
		3. Define reversing journals	
		4. Journal wizard overview	
	E. Define and generate allocations		
	F. Import journals		
	G. Budgets		
		1. Upload budget data from spreadsheet	
		2. Report on budgets	
	H. Inquiry		
	I. Basic standard reports		
Week 1 Day 4 (½ day)	**IV.** **Fixed Assets Basics**		AA (DOT), BPGL, DFS, PJL, PM, CC, PS, TPL, TRL, DSA (4)
	A. Define Asset Information		
		1. Define category, location, asset key flexfield.	
		2. Define depreciation calendar, books, methods, and rates	
	B. Manage asset information		
		1. Create and add assets manually	
		2. Perform adjustments and transfers	
		3. Inquire on asset transactions and other asset data	
	C. Calculate Depreciation		
		1. Use supplied depreciation methods and rates to calculate depreciation	
	D. Standard Reports		
Week 1 Day 5 (1 day)	**V.** **Accounts Receivable Basics**		
	A. Discuss setup concepts (not field by field— concepts only): Define payment terms, system options, accounting rules, autoaccounting, transaction types) - ok to incorporate setup concepts during training components		
	B. Manage Customer Information		
		1. Customer profile classes	
		2. Enter and maintain customers	
		3. Inquire customers	
	C. Item Maintenance (blend with invoices)		
		1. Add item	
	D. Process invoices		
		1. Enter invoices (overview types, enter standard)	
		2. Delete, cancel, update invoices	
	E. Apply payments		
		1. Apply manual cash receipts	
		2. Perform receipt inquiry	
		3. Reverse and reapply receipts	
Week 2 Day 1, 2, 3 (3 days)	**VI.** **Project Costing**		
	A. (in project costing section be sure to include discussions of burdening and cost budgeting)		
	B. Define Project Information		
		1. Define and maintain projects	
		2. Create project templates	
		3. Copy project and work breakdown	

Timing	Training Component	Attendees

	structures
	    4. Enter basic data
	    5. Create top-level tasks and sub-tasks
	    6. Specify project task overrides
	    7. Access project data
	C. Account for Time and Expenses
	    1. Enter pre-approved expenditure batches
	    2. Track usage of assets
	D. Determine Cost and Distribution
	    1. Calculate and account for raw, overtime, burden, usage and expense costs
	E. Project Status Inquiry
	    1. All PSI	

Week 2
Day 4, 5
(2 days)
	VII. Project Billing
	
	A. Define and Maintain Contract Projects
	    1. Create projects and work breakdown structures with hierarchical task organizations for direct (contract, billable) projects
	    2. Establish revenue budget and baseline it
	B. Define Customer Agreements
	    1. Define and maintain project funding
	    2. Determine hard revenue limits
	C. Track Billable Transactions
	    1. Enter and account for all billable and non-billable time and expenses
	D. Determine Revenue Recognition and Generate Invoices
	    1. Generate revenue for all billable tasks, items and events based on percent spent, rates and events
	    2. Create bill rate and cost-plus billing schedules for revenue and invoicing
	    3. Enter revenue and billing information
	    4. Generate revenue and invoices for all or specific projects
	    5. Utilize online review, create adjustments and identify and resolve errors for revenue and invoice generation
	E. Discuss Revenue Distribution and Billing Production Cycles
	    1. Review accounting transactions
	    2. Use Project Status Inquiry and Resource List to satisfy the different reporting requirements of project managers and financial professionals	

Week 3 Day 1, 2 (2 days)	**VIII. Accounts Payable Basics** A. Discuss setup concepts (not field by field—concepts only): Define payment terms, bank accounts, distribution sets, invoice approvals, expense report templates, matching tolerances,	

Timing	Training Component	Attendees

	overall Payables and Financials options - ok to incorporate setup concepts during training components
	B. Manage suppliers (includes both Payables and Purchasing aspects)
	    1. Enter supplier
	    2. Inquire supplier
	C. Process invoices
	    1. Enter purchase order to match to invoice (give explanation of standard PO concepts)
	    2. Enter invoices
	    3. Adjust, hold, release, cancel invoices
	    4. Invoice inquiry
	    5. View purchasing details on matched invoices
	D. Process payments
	    1. Process payments in batch
	    2. Void and stop payments
	    3. Perform payment inquiry
	E. Standard reports	

Week 3 Day 3 (1 day)	**IX. Federal extensions workshop** A. be sure to include Budgetary Control vs. Encumbrance Accounting (limited) B. be sure to include Process Interfund Transactions	
Week 3 Day 4, 5 (2 days)	**X. Understand Functions of Oracle Financial Applications (Part 2)** A. Identify application development building blocks, naming conventions and file directory structures	AA (DOT), BPGL, CVL, DBA (DOT), DFS, DSA, PJL, PM, CC, TAR, PS, TPL, TRL
	XI. Examine Tables and Views (case study of GL) A. Identify the primary tables used by the application B. Describe the uses of business, development and flexfield views	
	XII. Discuss Data Management Issues (case study of GL) A. Plan for data conversion B. Identify the open interface in the application C. Describe the available purge functions	
	XIII. Discuss Concurrent Manager Processing A. Review the use of the Concurrent Manager to understand its functions and capabilities	

	XIV. Application System Administration
	A. Manage Application Security
	    1. Identify components of sign-on security for Oracle Applications
	    2. Define user responsibilities	

Note: Order Entry is used only to the extent that it is needed to support the other applications (i.e. Purchasing). Training is limited to the setup required for this support and is included in the Purchasing section.

Note: Inventory is used only to the extent that it is needed to support the other applications. There will NOT be training on the Inventory application.

Note: For Purchasing, if the scope is greater than expected more Purchasing topics in the Advanced training will be included.

Note: Profile options are discussed individually in the application sections as appropriate (limit to key profile options; advanced can be discussed later).

Advanced Training

The approach for advanced training is to identify which Oracle training components are satisfied in the introductory training and which need to be included in an advanced training session. To do this, a comparison will be made between all the training components for Oracle Financial Applications offered by Oracle and those that are included in the introductory training. Those not included in the introductory training are candidates to be included in the advanced. However, it is possible that some components will be covered by knowledge transfer from Oracle consultants in SDL-1 and employees would not require formal training in that area. Therefore, the actual dates, duration, and content will be defined at a later time.

Training Preparation Checklist

Technical Environment

- ❑ INSTALLATION Contact
- ❑ INSTALLATION Scheduled
- ❑ INSTALLATION Completed
- ❑ Printer Available
- ❑ Concurrent Manager Startup script
- ❑ Products installed
- ❑ Confirmation completed
- ❑ Space adequate for number of users
- ❑ RDBMS & Application Compatibility

Contact: _____

Date: _____

Date: _____

Name: _____

Path/Name: _____

Date: _____

Training Resources

- ❑ Number of Trainees
- ❑ List of Trainees, Disciplines
- ❑ Facilities adequate for expected number of trainees
- ❑ Phone in training room
- ❑ Navigation Training Completed
- ❑ Introduction to Applications Object Library Training Completed
- ❑ Dependent Products Training Completed
- ❑ Navigation Documentation Provided (Optional)
- ❑ Operating System Users: User Names, Passwords
- ❑ Application Users: User Names, Passwords
- ❑ Sign-on Instructions
- ❑ Keyboard Mapping Template
- ❑ Reference Manuals
- ❑ Training Class Notes
- ❑ White Board, markers, flip charts
- ❑ Overhead Slides
- ❑ Overhead Projector
- ❑ Issues List Template

Number: _____

Number: _____

- ❑ Training Agenda
- ❑ Evaluation Sheets- Classroom
- ❑ Evaluation Sheets- Instructor

Follow-Up

❑	Secondary Technical Contact	**Name:** _____
❑	Secondary Technical Contact	**Phone:** _____
❑	Dial out instructions (Attached)	
❑	Local Oracle node	**Number:** _____
❑	System Administrator	**Name:** _____
❑	System Administrator	**Phone:** _____
❑	DBA	**Name:** _____
❑	DBA	**Phone:** _____
❑	SQL*Plus FIN Access	**Username:** _____
❑	SQL*Plus FIN Access	**Password:** _____

Products Installed

Finance:

❑	Assets	❑	Federal General Ledger
❑	Cash Management	❑	Federal Payables
❑	Financial Analyzer	❑	Federal Receivables

Supply Chain Management:

❑	Inventory	❑	Federal Purchasing
❑	Order Entry		

Projects:

❑	Project Billing	❑	Project Costing

Information Technology:

❑	Applications Data Warehouse	❑	OLAP/Financial Analyzer
❑	Business Agents (Alert)	❑	Oracle RDBMS

❑   Discoverer 3.0   ❑   Developer 2000

❑   Designer 2000   ❑   Oracle Express

❑   EDI Gateway   ❑   AOL

Internet:

❑   Application for the Web